



LIFEWORK

Bookkeeping Solutions

Estate Document Checklist

- Attorney Contact Information
- Bank and Brokerage Accounts
- Burial Instructions
- Business or Ownership Interest
- Child Care (if minor children)
- Credit Cards and Loans
- Doctors/Health Care Providers
- Durable Power of Attorney
- Employment Information
- Government Benefits
- Financial Advisors/Accountant
- Health Directives
- Insurance Policies
- Organ or Body Donation Instructions
- Other Income
- Other Information
- Other Personal Property
- Pet Information
- Real Estate Documents
- Retirement Plans and Pensions
- Safe Deposit Box
- Secured Places and Passwords
- Tax Returns
- Vehicle Titles
- Wills and Trusts